Case study

Financial services institution improves customer experience

Simplified digital content management live in weeks with HP TeamSite Cloud

Industry
Financial Services

Objective
To rapidly implement a flexible, secure and easy-to-use content management solution that manages targeted content for 200 of its more than 1,000 branches from a central location

Approach
An already satisfied HP TeamSite user, the financial services institution decided to expand its use of the solution to include digital signage and to enable group marketing to control the creation of targeted content from a central location

IT matters
• Enables solution to be delivered in weeks rather than years

• Minimizes IT resource requirements

• Provides peace-of-mind with a stable and robust platform

• Allows digital assets to be reused across 200 branches

• Eliminates need for time-consuming manual processes

Business matters
• Provides customers with a relevant experience in branch

• Enables delivery of targeted content in minutes rather than days

• Gives marketing full control over content creation and delivery

• Cuts cost while maximizing agility and flexibility

"Thanks to HP TeamSite Cloud we were able to provide the financial services institution with a robust, highly-performant, cost-efficient platform for creating and managing targeted, dynamic content that helps improve customer experience within a matter of weeks."

– Matthew Powell, business development director, Realise

HP TeamSite helps financial services institution deliver a compelling customer experience

The financial services institution wanted to enhance the customer experience across 200 of its 1,000-plus branches, leveraging digital signage to provide customers with a compelling, relevant in-branch experience. HP TeamSite Cloud provides a comprehensive content management system that enables timely creation of tailored content for its branches from a single central location. Delivered in weeks, the hosted solution cuts costs and improves agility.

Challenge

Delivering a modern in-branch financial services experience

The internet revolution has transformed the way we look after our money. Our smartphones, tablets and other computing devices have become an extension of traditional bricks and mortar financial services institution branches. We turn to them to view balances, transfer funds or set up standing orders, then set foot in-branch to complete the journey when we want to discuss mortgages or open accounts, for example.

Today's high street financial services institutions are committed to offering customers the same personal experience they receive online in their branches. They are modernizing their branches to deliver customers a more compelling digital customer experience.

Effective content creation and delivery

Many financial services institutions have adopted digital signage to deliver that modern and relevant in-branch experience. However, processes for creating and distributing content for the digital signs are often expensive and time-consuming. Marketing teams are forced to turn to costly digital agencies to create their digital content. After weeks of delay while videos are shot, cut, reviewed and then finally approved, branches then face further delays waiting for DVDs to arrive in the post.

This means financial services institutions cannot react quickly when they need to adapt messaging, while tailoring content to meet the needs of individual brands, regions or branches is prohibitively expensive.
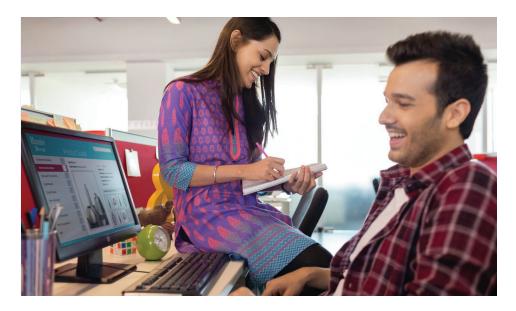
To save time and cut costs financial services institutions need an easy-to-use, flexible and cost-efficient dynamic content management solution (CMS) that will enable rapid creation and support the delivery of targeted digital content across multiple branches from a single central location.

Solution

Taking HP TeamSite to new territories

Already having successfully employed HP TeamSite for many years – initially to design and build its public and financial services websites and more recently its mobile site – the financial services institution decided to extend its use of the solution to include its new digital signage. The financial services institution could see how HP TeamSite would allow it to maximize the value of digital assets. With HP TeamSite videos and other digital content can be reused across 200 of its branches.

To maximize cost, maximize flexibility and accelerate creation, the financial services institution chose to adopt the hosted HP TeamSite Cloud solution. Powered by HP Intelligent Data Operating Layer (IDOL), HP TeamSite Cloud offers the same site design and content management capabilities offered by HP TeamSite.

About HP Software

HP Software empowers organizations to understand and engage audiences, reach new customer segments, and deliver dynamic and personal experiences across every channel, including print, web, contact centers, and augmented reality. With a portfolio of industry-leading products, including HP Exstream, HP TeamSite, HP Qfiniti, HP Optimost, and HP Aurasma, marketers can increase revenue, conversion rates, and customer loyalty using the diverse and growing volume of information that powers today's world.

Delivered in weeks

The financial services institution turned to HP partner Realise, with its extensive HP TeamSite expertise, to design and implement the solution. The HP marketing technologies integration partner has been working with the HP TeamSite platform for more than 14 years and today boasts a staff of 140, including HP TeamSite experts. With the Realise heritage in financial services, the financial services institution was confident Realise fully understood the challenges it faced in deploying an innovative digital signage solution across its branches.

A team of two from Realise worked closely with the financial services institution to design and implement the HP TeamSite Cloud solution in just 12 weeks; eight weeks for design and four for implementation. "Being in the cloud meant we could hit the ground running," adds Alec Bennett, managing partner at Realise.

Implementation was followed by an eight-week test cycle, after which Realise began a phased rollout across 200 of the financial services institution's more than 1,000 branches as part of a nationwide branch network refresh. The robust HP CMS solution currently manages the creation and supports the delivery of content to the financial services institution's digital screens.

Clearance for financial products

The robust HP TeamSite Cloud solution is hosted in one of the HP local data centers, a site previously cleared for hosting systems that support some of the financial services institution's other products. Bennett notes, "HP provides hosting facilities for numerous corporates, so ensuring appropriate clearance wasn't an issue."

Three HP TeamSite Cloud instances sit across three virtual servers: one for development, one for test and one for production. HP supports the hardware, operating system and core HP TeamSite Cloud software instances, while Realise supports the overall CMS solution. As Bennett explains, "Realise sets up new users, configures new workflows and deploys any new functionality required."

Tight integration with third-party solutions

Realise combined HP TeamSite Cloud with Teradata's marketing resource management solution so the marketing team can co-ordinate content creation with commissioning and approvals.

To automate targeting and eliminate the manual processes typically needed to deliver customers a relevant experience, Realise integrated the HP CMS with a digital signage solution from Scala.

Customer solution at a glance

Software
• HP TeamSite Cloud

Our solution partners

realise

Messaging is crafted inside HP TeamSite and, once approved inside Teradata, is then wrapped inside a video and deployed to the Scala system. To target the messaging, Scala pushes the videos to digital signage within the financial services institution's branches substituting placeholders within the content with branch specific data from the financial services institution's data warehouse.

Benefits

Keeping content relevant takes minutes rather than days

With the HP TeamSite solution in place, the financial services institution's group marketing team can be confident they are delivering timely, relevant content to customers across its branches. "With HP TeamSite content can be updated daily so that it can be delivered to the branches in minutes rather than days," confirms Bennett. "Brands currently deliver between 10 and 20 releases each month."

What's more the messages can be automatically targeted by region or even down to individual branch level. "The solution automatically alters messaging and video playlists," notes Bennett. "The financial services institution is currently tailoring messages to reflect the time of day, the number of people in the branch and even the branch location and sales targets. The solution is very flexible."

Managing content for 200 sites from a single central location

The financial services institution's group marketing team has full control over content creation and messaging. It doesn't need to burden busy branch resources or turn to expensive third party resources. "There's clearly a cost-saving in reducing reliance on third party suppliers," adds Bennett.

The easy-to-use, advanced WYSIWYG interface provided by HP TeamSite Cloud means a team of just ten can manage the full content lifecycle for multiple brands and 200 branches.

Delivering peace of mind

Deployed on a robust, stable HP platform, HP TeamSite Cloud also minimizes the amount of resource Realise needs to expend on supporting and maintaining the solution.

"We have the peace of mind knowing the financial services institution's CMS is hosted in a world-renowned, best-in-class HP data center," states Matthew Powell, business development director at Realise. "It's robust, it's stable, it's scalable and it doesn't run out of steam when it's running big complex websites. With all that security, compliance teams can put a tick in the box."

Powell concludes by emphasising how HP TeamSite Cloud significantly accelerated time-to-market, "Thanks to HP TeamSite Cloud we were able to provide the financial services institution with a robust, highly-performant, cost-efficient platform for creating and managing targeted, dynamic content that helps improve customer experience within a matter of weeks."

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